

1961 Training -1

## GENERAL INFORMATION ON RECORDS MANAGEMENT TRAINING

### I. AGENCY OFFICE OF TRAINING

#### BASIC

1. Administrative Procedures
2. Intelligence Orientation
3. Writing Workshop
4. Effective Speaking
5. Filing Workshop
6. Printing Services Seminar
7. Budget Procedures
8. Survey of Supervision

#### INTERMEDIATE

9. Supervision
10. Management
11. Writing Workshop
12. Conference Techniques
13. Development of Budget Estimates

#### ADVANCED

14. Writing Workshop
15. Instructional Techniques
16. Operations Support
17. Operations Familiarization
18. Logistics Support
19. Management
20. Supervision in Research

### II. AGENCY RECORDS ADMINISTRATION

1. Records Management Briefing
2. Records Center Tour
3. On-the-Job Records Management Training
4. Visits to Other Agencies
5. Records Management Workshops and Seminars

### III. EXTERNAL TRAINING

#### BASIC

1. G.S.A. Workshops -  
Forms Correspondence - Records Disposition - Mail Operations
2. Department of Agriculture -  
Plain Letters - Records Management

#### INTERMEDIATE

3. Records Management Institute - American University and the  
National Archives (2 weeks)

4. Certificate in Records Administration - American University  
(8 Semester Courses)
5. Orientation for Electronic Data Processing - Radio Corporation  
of America
6. GSA Seminar on Records Management (1 week)

ADVANCED

7. Archives Administration - American University and the  
National Archives (1 month)
8. Electronic Data Systems - Radio Corporation of America (1 week)
9. Graduate Study in Records Management - American University  
(10 Semesters)

IV. PROFESSIONAL SOCIETIES AND CONFERENCES

1. Society of American Archivists
2. National Office Management Association
3. Society for the Advancement of Management
4. Society for Public Administration
5. Inter-agency Records Administration Conference
6. Inter-agency Management Analysts Conference

NOTE: Call Extension 2468 for further information or to make arrangements  
to attend.

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Summary of Training Hours for On-the-Job Courses,  
Records Management Analysis (RMA), and Basic  
Records Management Analysis (BRMA)

<u>PHASE</u>	<u>SUBJECT</u>	<u>RMA</u>		<u>Hours</u>	
		<u>Min.</u>	<u>Max.</u>	<u>Min.</u>	<u>Max.</u>
1.	Overall Records Management Program	16	16	28	28
2.	Reports Management	40	60	140	180
3.	Correspondence Management	40	60	140	180
4.	Forms Management	40	60	160	200
5.	Management of Record Keeping	60	80	180	240
6.	Records Disposition	<u>60</u>	<u>80</u>	<u>180</u>	<u>240</u>
	Totals	256	356	828	1068

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Check List for Records Management Analysis (RMA)  
and Basic Records Management Analysis (BRMA) On-the-Job Training Courses

<u>Phase</u>	<u>Knowledges and Skills to be Acquired</u>	<u>Check</u>
1. AGENCY RECORDS MANAGEMENT PROGRAM		
Briefing on overall Program with respect to: Concept, development, and administration of the Program; laws and regulations; and relationships with other Headquarters	a. General knowledge of Program background and administration b. Good knowledge of laws and regulations applicable to the Program c. Working knowledge of relationships between Records Management Staff and Operating Offices. d. Good knowledge of relationship between the various functional areas of records management e. Good knowledge of coordinating work within Rgt/S. f. General knowledge of the work in each functional area of records management (e.g. Forms Management, Reports Management, Records Disposition, etc.)	
RMA - 2 hours BRMA - 2 hours		
Study of Laws and regulations; Hoover Commission Reports on paperwork management; Staff reports of accomplishment; functional statements		
RMA - 4 hours BRMA - 16 hours		
Briefings on each functional area of the Records Management Program		
RMA - 10 hours BRMA - 10 hours		

<u>Phase</u>	<u>Knowledge and Skills to be Acquired</u>	<u>Check</u>
2. REPORTS MANAGEMENT		
Seminar, study, practice problems, and supervised work assignments covering reports analysis and control principles applicable to:		
a. Reviewing and coordinating proposed requirements for reports	a. Working knowledge of reports control records and procedures.	
b. Surveys	b. Working knowledge of reports analysis principles and methods	
c. Planning and developing reporting systems	c. Ability to plan, conduct, and present a reports analysis project involving a moderately complex reporting system	
d. Analyzing existing reporting systems	d. Working knowledge of report and directive writing	
e. Report and directive writing		
REA 40-60 hours		
BIA 140-160 hours		
3. CORRESPONDENCE MANAGEMENT		
Seminar, study, practice problems inspection tours, and supervised work assignments covering correspondence management principles applicable to:		
a. Formats and style	a. Working knowledge of the Staff's role in promoting improved correspondence practices	
b. Supplies and equipment	b. General knowledge of Agency correspondence standards	
c. Correspondence systems	c. Working knowledge of planning and conducting a correspondence survey	
d. Effective writing	d. Working knowledge of typists' supplies and equipment	
e. Correspondence surveys	e. Basic skill in analyzing correspondence with respect to:	
	(1) Developing or improving form and pattern letters	
	(2) Developing indexes to (1) above.	
	(3) Improving format and content of correspondence.	

<u>Phase</u>	<u>Knowledge and Skills to be Acquired</u>	<u>Check</u>
4. FORMS MANAGEMENT		
Seminar, study, practice problems, and supervised work assignments covering forms management principles applicable to: a. The creation, continuance, identification, procurement stocking, issuance and utilization of forms. b. The design and construction of forms and procedures related thereto.	a. Working knowledge of the records and procedures for processing requests for approvals of forms b. Working knowledge of requirements for identifying, procuring, stocking, and issuing forms. c. General knowledge of specialty forms and specialty printing and the preparation of specifications therefor. d. Basic skill in analyzing requirements for forms with respect to their: (1) Utilization (Essentiality, consolidation with other forms, elimination, related procedures, and instructions.) (2) Design and construction e. Ability to conduct a forms analysis project involving a moderately complex cut form, such a project to include: (1) Fact finding interview with requester. (2) Development and presentation of recommendations (3) Development of sketch and specifications. (4) Acceptance of product by requester.	
RFA 40-60 BRMA 160-200		
5. MANAGEMENT OF RECORD KEEPING		
Seminar, study, inspection tours, observations, practice problems, and supervised work assignments covering: a. Location of file stations b. File classification plans c. Records Systems d. Supplies and equipment e. Surveys f. Mail control systems g. Vital records	a. Good understanding of the "Official File" concept of locating file stations b. Working knowledge of the Agency subject-numeric plan and case filing systems. c. Thorough knowledge of the standard (stock) types of supplies and equipment d. General knowledge of specialty-type supplies and equipment. e. Ability to survey an administrative file at a Division or Branch level, such a survey to include: (1) Planning the survey (2) Conducting the survey (3) Developing recommendations with respect	

<u>Phase</u>	<u>Knowledge and Skills to be Acquired</u>	<u>Check</u>
5. MANAGEMENT OF RECORD KEEPING <u>CONTD.</u>	<p>to location of files, file classification plan, and supplies and equipment.</p> <p>(5) Training the file clerks</p> <p>(6) Preparing a survey report</p> <p>f. Working knowledge of mail control systems.</p> <p>g. Working knowledge of the Agency Vital Records program and general knowledge of Vital Records Repository operations.</p>	
6. RECORDS DISPOSITION	<p>Seminar, study, inspection tours, observations, and supervised work assignments covering:</p> <p>a. Laws and regulations governing records disposition</p> <p>b. The identification and scheduling of record and nonrecord material.</p> <p>c. Surveys</p> <p>d. Applying Records Control Schedules</p> <p>e. Records Center Operations</p> <p>RMA - 60 - 80 hours</p> <p>BRMA - 180 - 240 hours</p>	<p>a. Thorough knowledge of applicable laws, statutes, and regulations.</p> <p>b. Working knowledge of General Schedules.</p> <p>c. Working knowledge of record and nonrecord criteria applicable to existing Agency schedules.</p> <p>d. Working knowledge of inventorying and scheduling procedures.</p> <p>e. Ability to survey a small staff office (e.g. General Counsel), such a survey to include:</p> <p>(1) Planning the survey</p> <p>(2) Inventorying the records</p> <p>(3) Developing schedules</p> <p>(4) Securing approval of schedules</p> <p>(5) Preparing schedules in final form</p> <p>(6) Preparing survey report</p> <p>f. Ability to apply a schedule for the retirement or destruction of records.</p> <p>g. General knowledge of Archives and Records Center operations.</p>

RECORDS MANAGEMENT SEMINARS

The first Records Management Seminar will be held on October 17, instead of October 7 as reported on the Interagency Records Administration Conference flyer you recently received announcing the September 16 meeting.

This is a five-day seminar for Records Management Analysts to be held monthly by the National Archives and Records Service. Applications should be sent in at least two weeks in advance of each seminar. Forms can be obtained from Room 103 National Archives Building, Code 13, Ext. 34626. The next scheduled Seminars are for October 17, November 14, and December 12.



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